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ABSTRACT

In academic libraries, online searching services and reference departments often have to compete for a share of financial and personnel resources. This paper examines how San Jose State University Library solved the problems of shrinking budgets, space constraints, and loss of trained searchers by integrating the online search service into the reference department. The process of simultaneously providing patron services and training online searchers is described; and recommended policy and procedure adjustments, funding projections, space considerations, and problems encountered during the integration process are considered. It is concluded that integrating the online search service into the reference department is a good method for maximizing the resources at hand while planning for development and growth, and would be an especially effective alternative for academic libraries faced with budget cuts as well as libraries planning to add online search services. Statistical data are presented in three tables, and references are provided. (Author/KM)

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Integration of an Online Search Service into the Reference Department

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Abstract

In academic libraries, online searching services and reference departments often have to compete for a share of the same resources, i.e. budgets and personnel. This paper examines how San Jose State University Library solved the problems of shrinking budgets, space crunch and loss of trained searchers by integrating the online search service into the reference department. The article describes the planning stages and interim organization necessary to effect the required changes. The paper also delineates how to simultaneously provide patron services and train online searchers, and includes discussions of recommended policy and procedure adjustments, and problems encountered. The conclusions analyze the use of this method in establishing a new online search service as well as its effect on academic reference service.

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During the 1983-84 academic year, San Jose State University Library was faced with impending budget cuts which could have meant the loss of 11.3 serialized librarian positions. In this uncertain climate, five tenure-track librarians left for employment elsewhere, including the Program Head for Online Reference Services in the Library and four experienced searchers. In less than six months, the library had lost most of its experienced searchers, including important coverage in the physical sciences, and was unable to replace the Program Head for Online Search Services.

With budget cuts and the loss of trained staff, several problems had to be faced: how to administer the program without a separate program head; how to increase the searching expertise of remaining librarians; and how to handle the growing demand for searches from students and faculty. In addition, we wanted to decrease the search turn-around time (speeding up administrative processes and decreasing the time between request and printed results), get better fiscal control over the online budget, review policies and procedures, plan for future expansion, and better control equipment and supplies. These tasks had to be accomplished simultaneously while continuing to provide service to patrons.

METHODS

Reorganization Committee

A reorganization committee was created to look at possible solutions. The "streamlining committee" consisted of one experienced searcher, a library assistant experienced in reorganizational concerns of reference, and the student assistant who had been working with the online program for

some time. The committee examined recordkeeping procedures and forms in order to streamline the operation. Where possible, functions were consolidated, recordkeeping simplified, and decisions made on what records were needed and in what form for budgetary concerns. Under existing conditions, the online budget has to be expended during the fiscal year or funds are lost.

Searcher Questionnaire

A brief questionnaire was sent to all librarians trained in online searching. They were asked where the online lab should be placed (first or fifth floors), whether to retain the existing subject file of previous searches, and what adjustments were necessary in how cash payments should be handled. Searchers were also queried as to how competent they felt they were, how much searching they could handle, subject areas of expertise, whether a refresher in searching techniques was needed, subject areas where training was needed, and lastly, any comments or suggestions they had as to how online reference should be restructured. This was their chance to indicate pet peeves, ideas, and dreams.

Literature Review

A review of published literature on computer literature searching and reference was conducted. Most of the articles discovered were concerned with the recognition and establishment of online searching as a function of reference services. How could searching be used at the reference desk? What relationship did it have and should it have to traditional reference work? The article by Connie Lamb in 1981 summarized current practice when she said: " In response to the question on organization, most institutions indicate that their online search services are a part of or an extension of Reference and several more designate their position as part of Public

Services in general."[1]

While no articles discussed how to modify an existing service, some articles did identify several suggestions on areas to change. Most notable were:

(1) Searching can be a consulting experience, with sharing of expertise.[2]

(2) Some checklist or packet of information for users should be prepared.[3]

(3) All reference librarians should search all online sources.[4]

(4) Libraries with search appointments liked them. Search sessions varied with as much as one hour appointments.[5,6,7]

(5) Orientation programs should be included to change staff attitudes.[8]

(6) Search interviews are very important, longer than reference interviews, and should be held with the person doing the search.[9,10]

(7) Librarians need more training to handle searching effectively.[11,12,13,14]

(8) A fully integrated or centralized system should be used for distributing and recordkeeping on searches.[15]

(9) Librarians should be able to point out alternative sources to search questions where appropriate.[16,17]

(10) Handing out searches causes delays in completion of searches, and can bypass a searcher's special expertise.[18]

(11) Efficient operation in search turn-around time is needed.[19]

All of these suggestions were discussed and considered for inclusion in reorganization of search services as San Jose State University.

REORGANIZATION

A two-step reorganization process was chosen. Step one would involve

an interim organization to be used during the spring 1984 semester. Step two would be the trial run during the fall 1984 semester of the new organization.

Previous Organization

Online searching was first offered to students and faculty at San Jose State University in 1981. The Online Search Services Coordinator, who reported to the Public Services Division Head, was assigned student assistant help to handle the clerical functions. The Coordinator handled emergencies, training, organization, problems and excess searches. In a later reorganization, the Coordinator was designated a Program Head, with 60% administrative time, similar to other administrative positions in the Library. Reference librarians completed searches as assigned or volunteered for searches. Some searchers completed considerably more searches than others. More difficult or esoteric searches suffered delays as no one wanted to complete them. Additional delays were encountered in contacting the patrons, some of whom were only available at odd hours. Prints were distributed from the reference desk, but cash payments had to be handled from the online office.

Interim Organization

During the spring 1984 semester, one librarian was designated as program chair who distributed searches as equally as possible among the remaining searchers, based on expertise level, subject interests, and time allocated to online reference. In practice, simple ERIC searches were distributed to inexperienced searchers and engineering, business and science searches were handled by the more experienced searchers. Searchers still had to contact patrons and run the search at their convenience. The most experienced searchers handled emergencies, problems, and demand for

special services such as online demonstrations.

At the same time, the reorganization committee reviewed and streamlined functions handled by the online reference program. For example, a subject card file had been kept on searches in the theory that searchers could look at past searches for strategy and/or valuable prints. In practice, this time-consuming file was seldom consulted. The practice of photocopying search results to accompany this file was also discontinued.

In the past, the Hewlett-Packard 2621p terminals and manuals were in two separate rooms, the online lab and the online office. With the exception of a terminal for the reference desk, these were consolidated into the online lab for the convenience of the searchers. An inventory of database manuals was begun to discover the extent of the collection and to update the collection where necessary. With only some of the manuals cataloged into the library's main collection, no complete record of the collection existed. Since many less-experienced searchers found the terminals somewhat complicated to use, extensive refresher training was conducted.

We have run quick searches at the reference desk since the online service began. When a ready reference search was run, the printout was photocopied for the student so that the printout could be used for logging-in. The time-consuming procedure resulted in the reference librarians being away from the desk for longer than desired. We revised these procedures, creating a form to record necessary information: time on, time off, costs, databases used, kind of questions, etc. The printout could be given directly to the patron. In this way we continued through the semester while developing the new organizational system to be tried

during the fall semester.

Trial Run

Discussion of the trial run period during the fall 1984 semester can be divided into five sections: administrative organization, reference desk, the online lab, and the handling of emergencies and resource allocation.

Administration. The new administrative organization placed control of the online program under the Reference Department Head as an integral part of the reference department rather than as a separate program. An advisory committee was formed, the Online Steering Committee. The Department Head served as a member of the committee along with three searchers and the online student assistant. The committee's charge was to serve as a planning and policy making group. As such, the committee pinpointed training areas, provided training to two beginners, held an open house to acquaint all library staff with the facilities, investigated and made recommendations on policy, procedures and the purchase of new equipment.

The new administrative organization required clerical assistance on a permanent basis rather than student assistant help. The committee recommended hiring a half-time clerical assistant to handle duties previously handled by the student assistant, such as logging in and invoice preparation plus new responsibilities including all record keeping, equipment and supply maintenance, vendor contacts, and special projects. The clerical assistant also served as secretary of the Online Steering Committee. In the past, the Program Head had completed some of the necessary recordkeeping, but now the clerical assistant handled day-to-day operations including keeping a running account of current

budget figures.

The program changes meant a revision of several policies and the documents supporting those policies. Searches were limited to students, staff and faculty. Community patrons were referred to other search services in the area. For eligible patrons, searches were offered on a "search on demand" basis. Reference staff no longer had to weed patrons as to suitability of the search topic or require patrons to do some preliminary research in the indexes first. These tasks were handled during the search interview appointment. A records policy was created. In the past all full and ready reference searches were kept on the theory that the older searches might help in the creation of a new search. Now records are kept for a year: the current semester plus the previous semester.

Reference Desk. Patrons who asked at the reference desk for a search, or were referred to the search service, were given a packet containing an appointment form, a description of what a search is and what is received, a detailed breakdown of the charging policy, and the search request form. Questions about the search process and the search topic were answered by reference librarians. Patrons were requested to make an appointment during scheduled online lab hours (8:30-10:00 in the morning and 3:00-4:30 in the afternoon) and the appointments were entered into the online calendar (a three-ring notebook at the reference desk). Completed search request forms turned in to the reference desk were placed in a basket to be taken to the lab. Patrons unable to make scheduled appointment times were referred to the reference department head or scheduled at other times at the discretion of the reference librarian/searcher who took the search. Ready reference searches were performed at the reference desk at

the discretion of the librarian, usually as part of a reference question. These patrons were referred to the search service if appropriate. Some problems were experienced with reference staff who continued to grill patrons as to the advisability of the search, or refused to set up appointments, and with non-reference staff unfamiliar with searching, but working occasional hours at the reference desk.

Online Lab. Searches were completed during half hour appointments in the lab. The searcher would discuss strategy with the patron and proceed to run the search. A ready reference search could be run or the patron could be referred to printed sources if these were more suitable to the search topic. The lab was staffed with two reference librarians, one experienced and one less-experienced searcher. As part of their reference assignment, librarians were scheduled in the online lab for 18 staff hours per week (1-4 hours per person), with experienced searchers putting in more hours than the less-experienced ones. To provide librarians to staff the online lab, reference desk staffing was reduced. After discussions with the reference department, the number of librarians at the reference desk was reduced between 8-10 AM, 6-10 PM and on some weekends.

The two librarians worked as a team at first to prepare searchers. The less-experienced searcher could observe, learn from the experienced searcher, and pick up tips. Then the less-experienced searcher tried simple ERIC searches under the guidance and assistance of the experienced searcher. Someone was always available to help with equipment and searching problems. Every searcher was to search every subject. Where possible, searchers were notified of difficult topics ahead of time or checked search request forms in advance. Patrons were requested to be present for the search. Cancellations and no-shows were asked to

reschedule. At the patron's request, the search could be run in his/her absence. When no appointments were scheduled, the time was used for training and practicing on free databases to increase expertise.

Emergencies and Resource Allocation. The most important emergencies that arise when using an appointment approach are staff absences. Absences known in advance were handled by crossing off appointment blocks. For example, our scheduled department meetings were on Tuesday afternoons. Since non-reference librarians were used to staff the reference desk during these times, this period of online appointments was permanently crossed off the calendar. In the case of illnesses, blocks were crossed off or replacements found where available. When these options were unavailable, such as large segments of the staff down with the flu, patrons were called and asked to reschedule their appointments. Patrons unhappy with search results were handled in one of two ways. If possible, the searcher who ran the search was notified to discuss the search and rerun it. Otherwise an experienced searcher would soothe the patron and rerun the search at no cost to the patron. Errors were charged to training for that searcher. Available resources can be controlled by manipulating the lab appointment blocks. For example, during the fall 1985 semester, Friday appointments were eliminated because of staffing problems.

RESULTS

Results were measured in terms of searching activity, cost of a search, most frequently used databases, and responses from patrons.

Searching Activity

The changes made to the online searching program at San Jose State University Library resulted in increased searching activity, increased searcher expertise and more patron satisfaction. As seen in Table I,

the online searching program experienced a 15% growth change between 1982-83 and 1983-84 and a 68% growth change in 1984-85. We handled more searches with less staff. The reduction in the number of training searches in 1984-85 reflects a moritorium placed on these funds because allocated searching funds had been spent during the fall 1984 semester. More funds were requested for regular and ready reference searching for spring 1985, but training and live demonstrations to classes were discontinued to conserve funds. The increase of 68% in the overall number of searches performed in 1984-1985 is misleading. Ready Reference searches for 1984-1985 increased by 200%, which reflected searcher satisfaction with the new Texas Instruments Silent 700 series terminal purchased for use at the reference desk and new ready reference procedures. Searchers responded to the new terminal so well that the ready reference policy was rewritten with more restrictions as to databases used. Regular searches increased by 28%. Fall 1985 was compared with fall 1984, showing an increase of 15% in the number of searches performed.

Cost of a Search

From statistics collected, we measured searching activity in terms of the average cost of a search and the number of databases used. We expected the average cost to drop slowly as searchers became more proficient. As shown in Table II, the average cost dropped 9% in 1984-85. This figure reflects increased ready reference activity, not just searcher proficiency.

Databases Used

At the same time, the average number of databases used dropped from 3.4 to 2.9. Searchers showed more willingness to experiment in different and/or unfamiliar databases in 1983-84 and showed more confidence in choosing databases to search in 1984-85. Searchers were able to handle a

variety of subject areas and reflected a more participative attitude. In the lab, searchers were supportive of each other, asked more questions than in group sessions, and demonstrated willingness to learn more about searching in general and searching of specific databases. Several training sessions were held during the spring 1985 semester, including sessions on advance searching tips, Dialog2 and Wilsonline. Several more are planned on searching specific subject areas such as engineering, business, etc.

Frequently Used Databases

The most frequently used databases were tabulated. These are shown in Table III. The 1983-84 list reflects the changing expertise of our searchers. Several searchers who left in 1983-84 had extensive science background and the engineering librarian was on maternity leave. The most experienced searchers had backgrounds in business and the social sciences, which are clearly reflected in these results. The 1984-85 list of databases more accurately shows databases searched in all subject areas during lab hours. The heavy usage in ERIC and PsychInfo continues. The use of Medline, ABI/Inform, and the engineering databases indicates patron demand in these areas. No advertisement or promotion of the service has been attempted so databases reflect areas where faculty recommend student searches, word of mouth referrals, and librarian referrals from the reference desk.

Patron Responses

Patron responses to the online lab hours can be seen in several ways: no-shows, evaluation forms and comments. Of the regular searches scheduled in 1984-85, 6% were no-shows. This did not include cancellations which were rescheduled for another time. During fall 1985 a higher percentage of no-shows (8.3%) was experienced. As most no-shows did not turn in their search request form prior to their appointment, the completed form is now

required before a lab appointment can be scheduled.

A search evaluation form is included with all print packets distributed. The search evaluation form was changed to measure more accurately patron satisfaction. We were concerned with whether results of seachers were on target and whether results were achieved on time. This would indicate a quicker response time with more hits. During 1983-84, 21% of the evaluation forms were returned and 13% during 1984-85. No comparison of the data between years could be made because of alterations made in the evaluation form.

Evaluation forms for 1984-85 were examined for comments from patrons about the search service to identify recommended changes from the users point of view. Patrons made the following comments and/or suggestions:

(1) Recommended the service be promoted more extensively.

(2) Found the appointment system very helpful.

(3) Found librarians very friendly and very helpful.

(4) Gained a better idea of what material was being found.

(5) Gained insights into the research process. For example, some patrons recognized searching as a good place to begin their research into a subject, while others focused on the need to narrow the subject in order to increase the relevancy of citations retrieved.

CONCLUSIONS

An online reference service clearly can be included as part of the Reference Department, using the administrative structure of the Reference Department, with the addition of sufficient clerical support and a policy-making committee. It is clear that academic libraries, libraries faced with budget reversals, and libraries planning to add online search services should consider this arrangement. It is an alternative method for

maximizing the resources at hand while planning for development and growth. It allows for more controlled growth and searcher training. Searchers have been able to help each other progress while satisfying users. Available resources can be allocated and controlled by manipulating lab appointment blocks. There is opportunity here to plan for development, to control growth and to provide searcher training while satisfying patrons.

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TABLE I

TOTAL SEARCHING ACTIVITY BY TYPE ON DIALOG AND BRS

Type of Search	Fiscal Year 1982-1983 Total	Fiscal Year 1983-1984 Total	Fiscal Year 1984-1985 Total
Regular Search	197	333	425
Ready Reference	153	199	527
Training Search	87	99	110
Total	537	631	1062
Percent Growth	---	+15%	+68%

TABLE II

AVERAGE COST OF A SEARCH AND NUMBER OF DATABASES USED

Year	Average Cost	Per cent Change	Average Number Databases Used
1982-83	$17.96	---	3.1
1983-84	$16.50	-8%	3.4
1984-85	$15.05	-9%	2.9
1985-86*	$13.82	-8%	2.9

* Fall 1985 only.

TABLE III

MOST FREQUENTLY USED DATABASES

1982-1983		1983-1984		1984-1985	
Database	Connect Hours	Database	Connect Hours	Database	Connect Hours
ERIC	38.86	ERIC	38.86	ERIC	35.26
Psych-info	16.39	Psych-info	17.86	Medline	16.88
Medline	8.38	Biosis	6.25	Psych-info	13.22
Biosis	8.13	ABI/In-form	6.20	ABI/In-form	9.01
Inspec	3.06	CA Search	2.15	Inspec	6.87
Compendex	2.31	Magazine Index	1.35	Compendex	5.68
Sociol-logical Abstracts	1.89	Manage-ment Contents	1.35	America, History and Life	3.57